

# *Project Integration Management - A Case Study*

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# Overview

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# 1. Session Objective

***To demonstrate the application of Project Integration Management to a real-life case study project.***

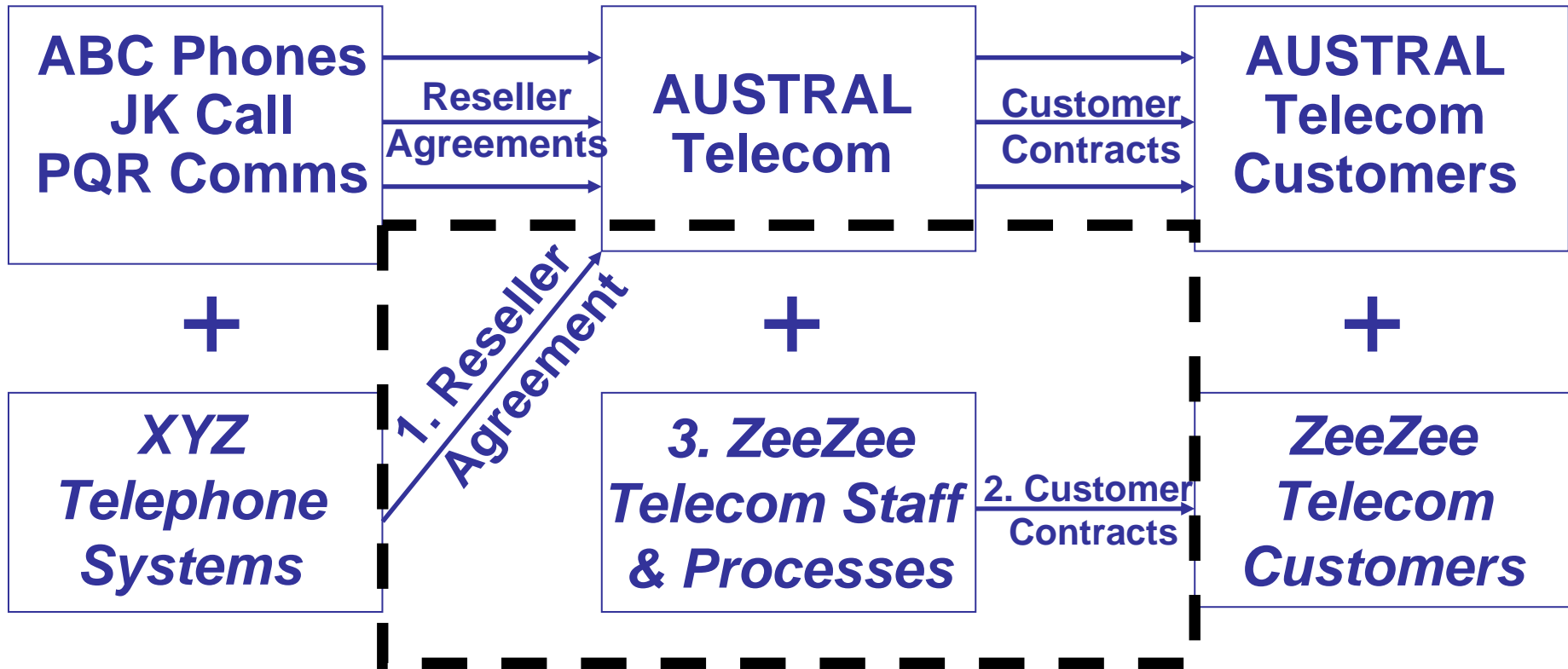
Reference : PMI PMBOK 3<sup>rd</sup> edition 2004 – Chapter 4

## 2. Case Study - Background

- **AUSTRAL Telecom – Tele & Data Communications Company**
- **AUSTRAL Telecom Strategy - Build/Buy Growth**
- **Buy Strategy**
  - **Objective – Gain XYZ Telephone Systems Sales & Support Capability**
  - **ZeeZee Telecom is a company that sells and supports XYZ Telephone Systems**
  - **AUSTRAL Telecom to Acquire ZeeZee Telecom to Add XYZ Telephone Systems Sales & Support Capability**
- **Acquisition and Integration – Key Components**
  1. **XYZ Telephone Systems Reseller Agreement**
    - Agreement between AUSTRAL and XYZ Telephone Systems Co.
  2. **ZeeZee Telecom Customer Contracts**
    - Customer Support (& New Sales/Upgrades)
  3. **ZeeZee Telecom - Staff & Processes**
    - Sales, PreSales, Project Management, Implementation, Customer Services & Support

# 2. Case Study - Background

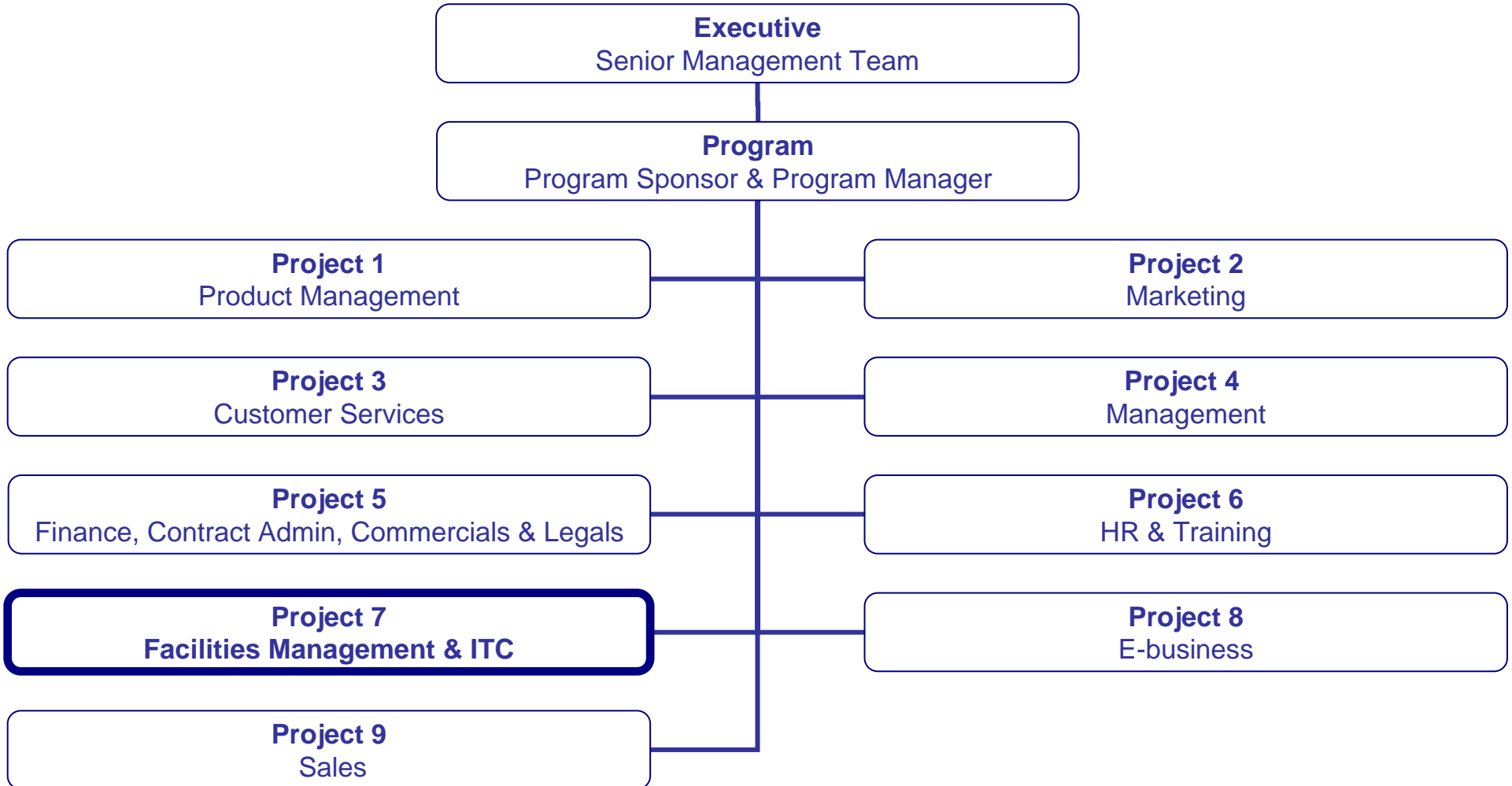
Original  
Equipment  
Manufacturers (OEMs)



## Acquisition & Integration – Key Components

# 3. Case Study Background

- Acquisition & Integration managed as a program of work
- Program of work comprises multiple inter-related projects



## 2. Case Study – Background

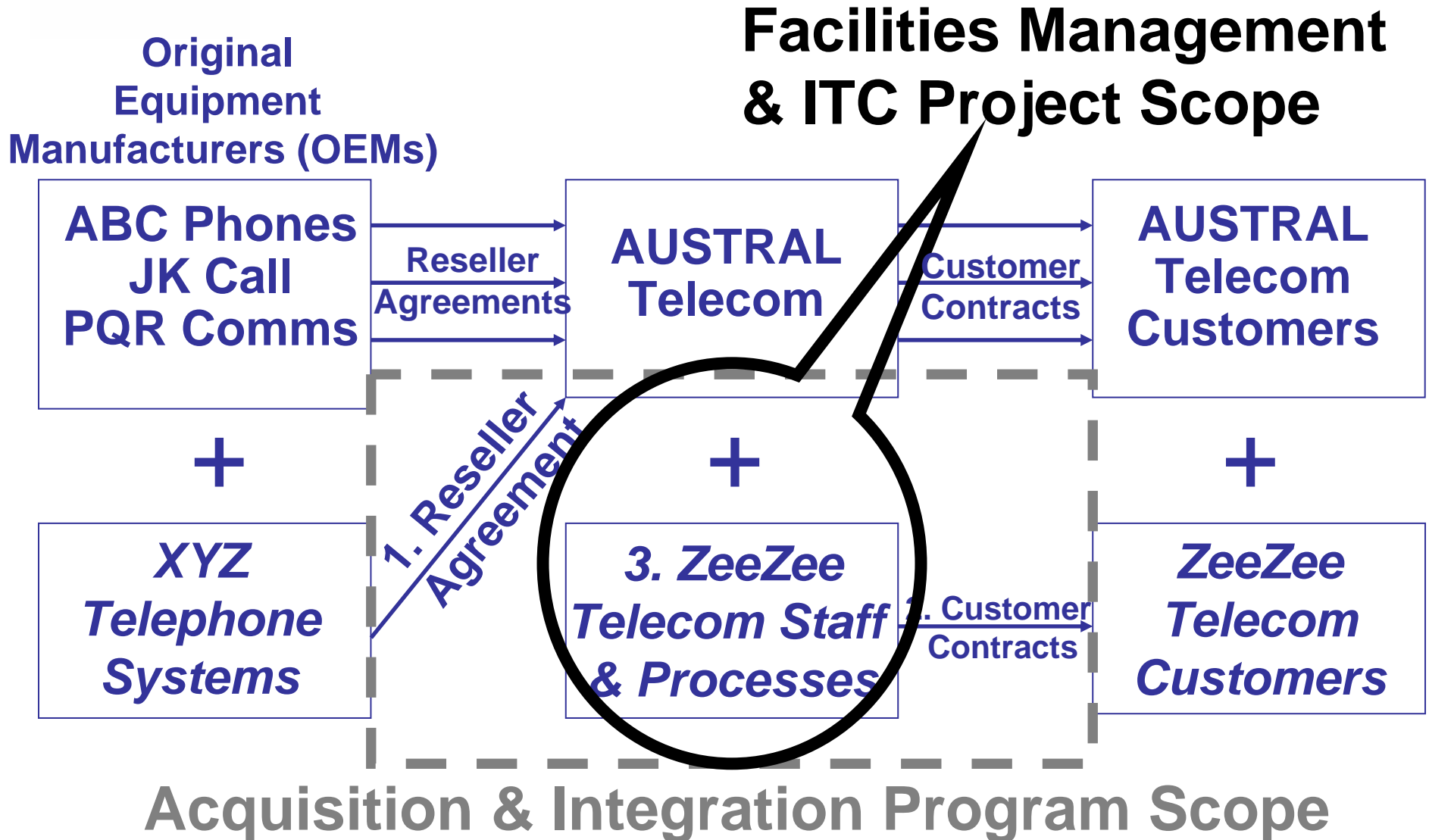
### Case Study project - Facilities Management & ITC project

**Facilities Management scope**  
includes everything related to a person's work environment, primarily workstation & tools of trade e.g. mobile phone, uniform, car, car parking

**ITC scope**  
includes everything related to a person's Information Technology & Communication needs e.g. laptop/PC, remote access, specialist software, fixed phone services



# 2. Case Study - Background





# 3.1 Develop Project Charter & 3.2 Develop Project Scope Statement

PMI PMBOK	Case Study – FM & ITC Project
<p><b>Inputs</b></p> <ul style="list-style-type: none"> <li>• Contract</li> <li>• SOW</li> <li>• Env. Factors</li> <li>• Org. Processes</li> </ul>	<p><b>Inputs</b></p> <ul style="list-style-type: none"> <li>• AUSTRAL Strategy – Build/Buy – Buy Strategy</li> <li>• ZeeZee Acquisition Business Case</li> <li>• ZeeZee Acquisition Agreement – Legal Obligations</li> <li>• ZeeZee Acquisition Budget</li> <li>• Program Governance – Reporting &amp; Approvals</li> <li>• Program Charter, Scope Statement, Management Plan</li> </ul>
<p><b>Tools &amp; Techniques</b></p> <ul style="list-style-type: none"> <li>• Project Selection</li> <li>• PM Methodology</li> <li>• PMIS</li> <li>• Expert Judgement</li> </ul>	<p><b>Tools &amp; Techniques</b></p> <ul style="list-style-type: none"> <li>• Program/Project Driven By Inputs (as above)</li> <li>• PMO Processes &amp; Templates</li> <li>• Program Portal</li> <li>• Subject Matter Experts i.e. HR, FM &amp; ITC</li> </ul>
<p><b>Outputs</b></p> <ul style="list-style-type: none"> <li>• Project Charter</li> <li>• Project Scope Stmt</li> </ul>	<p><b>Outputs</b></p> <ul style="list-style-type: none"> <li>• Project Charter &amp; Scope Statement Defined By Program Charter, Scope And Management Plan</li> </ul>

# 3.3 Develop Project Management Plan

PMI PMBOK	Case Study – FM & ITC Project
<p><b>Inputs</b></p> <ul style="list-style-type: none"> <li>• Project Scope Stmt</li> <li>• PM Processes</li> <li>• Env Factors</li> <li>• Org. Processes</li> </ul>	<p><b>Inputs</b></p> <ul style="list-style-type: none"> <li>• Program Management Plan Including Definition of FM &amp; ITC Project Scope</li> <li>• Environmental Factors &amp; Organisational Processes               <ul style="list-style-type: none"> <li>– Legal e.g. No Personal Detriment</li> <li>– HR Policies &amp; Processes e.g. Benefits</li> <li>– FM Policies &amp; Processes e.g. Implement OH&amp;S</li> <li>– ITC Policies And Processes e.g. IT Security</li> </ul> </li> </ul>
<p><b>Tools &amp; Techniques</b></p> <ul style="list-style-type: none"> <li>• PM Methodology</li> <li>• PMIS</li> <li>• Expert Judgement</li> </ul>	<p><b>Tools &amp; Techniques</b></p> <ul style="list-style-type: none"> <li>• PMO Processes &amp; Templates</li> <li>• Program/Project Governance</li> <li>• Program Portal</li> <li>• FM &amp; ITC Managers And Specialist Staff</li> <li>• HR Manager</li> </ul>
<p><b>Outputs</b></p> <ul style="list-style-type: none"> <li>• Project Mgmt Plan</li> </ul>	<p><b>Outputs</b></p> <ul style="list-style-type: none"> <li>• Project Management Plan</li> <li>• Project Schedule</li> </ul>

# 3.3 Develop Project Management Plan

**1.0 Document Control**

**2.0 Executive Summary**

**3.0 Scope**

**3.1 Inside Scope**

**3.3 Outside Scope**

**4.0 Project Governance & Organisation**

**5.0 Project Milestone Schedule**

**6.0 Key Deliverables**

**7.0 Budget & Cost Management**

**8.0 Communications Management**

**8.1 Status Meetings**

**8.2 Status Reporting**

**8.3 Portal**

**9.0 PMO Processes**

**9.1 Risk Management**

**9.2 Quality Management**

**9.3 Change Management**

**9.4 Issues/Action Item Management**

**10.0 Attachments**

## 3.3 Develop Project Management Plan

### Facilities Management Scope – Key Deliverables

- Workstations i.e. desk, chair, filing cabinet, shelving, fixed phone
- Mobile Phones
- Site Access Cards
- I.D. cards incl. photo and employee number
- Cars/Car Parking
- Business Cards
- Additional Staff - Sydney Office FM Administrator



### IT&C Scope – Key Deliverables

- Laptops/PCs incl standard software applications
- PC specialist software applications, remote access tokens
- Tele & data communications infrastructure upgrades

# 3.4 Project Execution

PMI PMBOK	Case Study – FM & ITC Project
<p><b>Inputs</b></p> <ul style="list-style-type: none"> <li>• Project Mgmt Plan</li> <li>• Corrective &amp; Prev. Action Requests</li> <li>• Approved CRs</li> <li>• Repair Requests</li> <li>• Admin Closure</li> </ul>	<p><b>Inputs</b></p> <ul style="list-style-type: none"> <li>• Project Management Plan</li> <li>• Project Schedule</li> <li>• Approved Requests               <ul style="list-style-type: none"> <li>– Spend Requests e.g. Travel</li> <li>– Prev. Action Requests e.g. Addnl/Unplanned Travel</li> <li>– Change Requests e.g. Cabling Upgrade</li> <li>– Repair Requests e.g. Replacement Tele Headsets</li> </ul> </li> <li>• PMO Project Close-out Process &amp; Templates</li> </ul>
<p><b>Tools &amp; Techniques</b></p> <ul style="list-style-type: none"> <li>• PM Methodology</li> <li>• PMIS</li> </ul>	<p><b>Tools &amp; Techniques</b></p> <ul style="list-style-type: none"> <li>• Program Governance - Approvals Process</li> <li>• Program Portal</li> <li>• PMO Processes &amp; Templates – Risk, Quality, Change, Issues &amp; Action Management</li> </ul>
<p><b>Outputs</b></p> <ul style="list-style-type: none"> <li>• Deliverables</li> <li>• Changes</li> <li>• Corrective &amp; Prev. Actions</li> <li>• Defect Repairs</li> <li>• Performance Info</li> </ul>	<p><b>Outputs</b></p> <ul style="list-style-type: none"> <li>• FM &amp; ITC Deliverables</li> <li>• Implementation of Approved Requests</li> <li>• Performance Information               <ul style="list-style-type: none"> <li>– Risk Register, Issues/Action Item Register</li> <li>– Deliverables Reviews</li> <li>– Status Meetings &amp; Reports, Issues/Action Log</li> </ul> </li> </ul>

# 3.5 Monitor & Control

PMI PMBOK	Case Study – FM & ITC Project
<p><b>Inputs</b></p> <ul style="list-style-type: none"> <li>• Project Mgmt Plan</li> <li>• Performance Info</li> <li>• Rejected CRs</li> </ul>	<p><b>Inputs</b></p> <ul style="list-style-type: none"> <li>• <b>Project Management Plan</b></li> <li>• <b>Project Schedule</b></li> <li>• <b>Performance Info</b> <ul style="list-style-type: none"> <li>– Risk Register, Issues/Action Item Register</li> <li>– Deliverables Reviews</li> <li>– Status Meetings &amp; Reports, Issues/Action Log</li> </ul> </li> </ul>
<p><b>Tools &amp; Techniques</b></p> <ul style="list-style-type: none"> <li>• PM Methodology</li> <li>• PMIS</li> <li>• EV technique</li> <li>• Expert Judgement</li> </ul>	<p><b>Tools &amp; Techniques</b></p> <ul style="list-style-type: none"> <li>• <b>PMO Processes &amp; Templates</b></li> <li>• <b>Program Portal</b></li> <li>• <b>FM &amp; ITC Managers And Specialist Staff</b></li> <li>• <b>HR Manager</b></li> <li>• <b>Staff Survey – FM &amp; ITC Questions</b></li> </ul>
<p><b>Outputs</b></p> <ul style="list-style-type: none"> <li>• Corrective &amp; Prev. Action Requests</li> <li>• Forecasts</li> <li>• Repair Requests</li> <li>• CRs</li> </ul>	<p><b>Outputs</b></p> <ul style="list-style-type: none"> <li>• <b>Prev. Action Requests e.g. Additional Travel</b></li> <li>• <b>Status Meeting Notes</b></li> <li>• <b>Schedule Updates</b></li> <li>• <b>Status Reports</b></li> <li>• <b>Approved Requests</b> <ul style="list-style-type: none"> <li>– Spend, Preventative Action, Change &amp; Repair</li> </ul> </li> <li>• <b>Staff Survey Report</b></li> </ul>

# 3.6 Change Control

PMI PMBOK	Case Study – FM & ITC Project
<p><b>Inputs</b></p> <ul style="list-style-type: none"> <li>• Project Mgmt Plan</li> <li>• CRs</li> <li>• Corrective &amp; Prev. Action Requests</li> <li>• Defect Repairs</li> <li>• Deliverables</li> </ul>	<p><b>Inputs</b></p> <ul style="list-style-type: none"> <li>• Project Management Plan</li> <li>• Project Schedule</li> <li>• Approved Requests               <ul style="list-style-type: none"> <li>– Spend, Preventative Action, Change &amp; Repair</li> </ul> </li> <li>• Deliverables</li> </ul>
<p><b>Tools &amp; Techniques</b></p> <ul style="list-style-type: none"> <li>• PM Methodology</li> <li>• PMIS</li> <li>• Expert Judgement</li> </ul>	<p><b>Tools &amp; Techniques</b></p> <ul style="list-style-type: none"> <li>• Program Governance</li> <li>• PMO Change Management Process &amp; CR Template</li> <li>• Program Portal</li> <li>• FM, ITC &amp; HR Managers and Specialist Staff</li> </ul>
<p><b>Outputs</b></p> <ul style="list-style-type: none"> <li>• CRs – Approved</li> <li>• CRs - Rejected</li> <li>• PM Plan updates</li> <li>• Corrective &amp; Prev. Actions</li> <li>• Defect Repairs</li> <li>• Deliverables</li> </ul>	<p><b>Outputs</b></p> <ul style="list-style-type: none"> <li>• Originally Scoped FM &amp; ITC Deliverables <i>plus</i></li> <li>• Implementation of Approved Requests               <ul style="list-style-type: none"> <li>– Spend, Preventative Action, Change &amp; Repair</li> </ul> </li> </ul>

# 3.7 Project Closure

PMI PMBOK	Case Study – FM & ITC Project
<p><b>Inputs</b></p> <ul style="list-style-type: none"> <li>• Project Mgmt Plan</li> <li>• Contract Docs</li> <li>• Env. Factors</li> <li>• Org. Processes</li> <li>• Performance Info</li> <li>• Deliverables</li> </ul>	<p><b>Inputs</b></p> <ul style="list-style-type: none"> <li>• Project Management Plan &amp; Schedule</li> <li>• ZeeZee Acquisition Agreement – Legal Obligations</li> <li>• ZeeZee Acquisition Business Case</li> <li>• ZeeZee Budget and Costs</li> <li>• Environmental Factors &amp; Organisational Processes – Legal, HR, FM &amp; ITC</li> <li>• Program Governance</li> <li>• Performance Information               <ul style="list-style-type: none"> <li>– Risk Register, Issues/Action Item Register</li> <li>– Deliverables Reviews</li> <li>– Status Meetings &amp; Reports, Issues/Action Log</li> </ul> </li> <li>• Deliverables</li> </ul>
<p><b>Tools &amp; Techniques</b></p> <ul style="list-style-type: none"> <li>• PM Methodology</li> <li>• PMIS</li> <li>• Expert Judgement</li> </ul>	<p><b>Tools &amp; Techniques</b></p> <ul style="list-style-type: none"> <li>• PMO Project Close-out Process &amp; Templates</li> <li>• Program Portal</li> <li>• FM, ITC &amp; HR Managers and Specialist Staff</li> </ul>
<p><b>Outputs</b></p> <ul style="list-style-type: none"> <li>• Administrative Closure</li> <li>• Contract Closure</li> <li>• Final Product/Service</li> <li>• Org. Process Updates</li> </ul>	<p><b>Outputs</b></p> <ul style="list-style-type: none"> <li>• FM &amp; ITC Deliverables</li> <li>• Project Close-Out Report</li> </ul>



# 4. Summary

**PMI PMBOK Project  
Integration Management  
provides**

- A Quality  
Management PM  
Checklist**
- A Common Sense  
Practical Guide**
- A Useful Reference  
for Novice and  
Experienced Project  
Managers**



**Project Integration Management is Project Management**